
CHAPTER 2 • FACILITIES PLANNING

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A. HOW TO DETERMINE THE AGENCY'S OVERALL FACILITIES NEEDS

In order to determine the Agency's overall facilities needs, it is essential that Agency staff responsible for facility issues develop a comprehensive analysis of services and activity for the Agency. This includes an inventory of the types of services provided, activities undertaken, and administrative responsibilities such as program administration, storage of records or other materials, printing and data processing and other specialized activities. The Agency should determine which operations can or must be housed at a single location, and which at separate, independent sites. This comprehensive analysis should reflect not only current operations but also anticipated changes as a result of changes in technology, legislation or other factors.

The Agency should then determine the types of spaces required, including: public reception; meeting areas; copy and mail areas; general office and storage. Some operations may require a number of different types of space. Other operations, such as storage, may require a single space type.

After the services and activities have been identified and the types of spaces have been determined, the Agency should define the number and general location for its facilities. This may be determined by one or more of the following factors: location of the client population, regional transportation patterns and services, advantages of locating in close proximity to other state agencies or services providers, and available and projected funding.

It is important that the Agency staff responsible for facility issues consult with others, both within and outside of the Agency. Consultation with human resource, finance and program personnel within the Agency may help to identify key factors for consideration. In addition, it may be advantageous to seek advice and information from planning professionals outside the Agency.

The Agency's current and projected financial resources will have a significant impact on its facilities planning. Therefore, the Agency should include in its comprehensive analysis an estimate of the administrative and operational costs associated with its facilities. These costs should include: improvements to reconfigure identified space; costs of basic services such as utilities and janitorial services; purchase and installation of office furnishings and equipment, which may range from systems furniture to telephone systems; and the cost of a potential move or relocation. Keep in mind that resources are necessary for occupancy of both state-owned and private leased space.

B. HOW TO MEET THE AGENCY'S NEEDS: EXPLORING OPTIONS

To meet the overall facilities needs, the Agency should consider the following location options: state or other public buildings; consolidation of agency operations under one roof; co-location of agency operations with those of another entity; continuing operations in an existing leased facility; or acquiring space under a new lease.

STATE OR OTHER PUBLIC BUILDINGS

First, the Agency should determine whether there is state space available to meet its needs, by contacting agencies which control state buildings and DCAM, which maintains information on state-owned properties; and by consulting with the Agency's staff with general knowledge of existing state facilities within the targeted geographic area. In addition, the Agency may explore the potential to lease other public space from governmental entities. In certain instances, such public space may be leased based on acquisition with reduced advertising described in Chapter 4.

CONSOLIDATION OR CO-LOCATION OF FACILITIES

The Agency should consider whether its programs and staff can be accommodated effectively by consolidating several of its existing offices into one location. The Agency may identify an opportunity to co-locate its operations with those of another Agency to achieve cost savings, program efficiencies or both. Such moves could entail acquiring new leased space or consolidating into an existing state-owned or lease facility.

CONTINUING OPERATIONS BASED ON LEASE EXTENSION

The Agency may determine that existing leased facilities can meet the current and foreseeable needs. In making this determination, the Agency should consider whether services and staff are well located and appropriately housed at the existing locations. In such cases, it is important to then determine whether the existing lease can be extended and, if so, whether it can be extended under reasonable terms. Please consult Chapter 4 of this Manual for documents to be used and procedures to be followed in extending an existing lease.

PROCURING SPACE UNDER A NEW LEASE

The Agency may determine that its facilities needs should be met through the acquisition of space under a new lease. Such space may be planned to house one or more state offices. Please refer to the materials in Chapter 4 of this Manual for specific information about how to plan for and options for how to acquire a new lease.

FURNITURE AND EQUIPMENT OPTIONS: SYSTEMS FURNITURE

The Agency should carefully weigh its options for use of existing or procurement of new furniture and equipment. These items represent a significant financial investment for the Agency. Making wise decisions will have a significant impact on the productivity and morale of staff. The planning materials in this manual include space and tenant improvement standards applicable to the use of modular systems furniture and conventional furniture. Because modular systems furniture may reduce the square footage required for an office, and may create work areas more adaptable to changes in operations, its use may reduce the costs of an Agency's lease and its office modifications to accommodate changing technology and programs. Therefore, DCAM urges agencies to evaluate the advantages of investing in systems furniture.

C. THE ANNUAL FACILITIES STATEMENT

The culmination of this analysis of overall facilities needs should be the preparation of an Annual Facilities Statement, summarizing the Agency's facilities needs and highlighting initiatives and strategies for meeting these needs over the next twelve to eighteen months. This Statement will provide the basis for discussions, coordination and decision-making within the Agency and between the Agency and DCAM or other outside parties. To illustrate the elements of an Annual Facilities Statement, examples have been included in Chapter 4. This statement is to be submitted to DCAM as part of an Agency's request for delegation of authority, or to initiate projects in partnership with DCAM.

D. HOW TO PLAN FOR A FACILITY

OVERVIEW

The Agency's individual Facility Plan is the basis for specific decisions and actions to locate new space or confirm continued occupancy in existing space. The Facility Plan must address the following topics: location; types and amount of space required; specifications for tenant improvements; required building conditions; landlord services; and budgeting.

Agency programs and services must be accessible to persons with disabilities, as required by the Americans with Disabilities Act (ADA). Please refer to the DCAM Office of Programming "ADA Transition Plan Workbook" for information about how to complete an analysis of an existing or potential location for an office or other facility.

LOCATING THE FACILITY

Facility location has an important impact on the Agency's ability to carry out its mandate; its accessibility to clients, service providers, and employees; and its operating efficiency. The goal is to identify the available property which is most cost effective and which best allows the Agency to carry out its mission in an effective and efficient manner. Criteria which should guide the Agency's planning for facility location include geographic search area; convenient access to appropriate transportation, proximity to other offices, reserved and public parking, and neighborhood compatibility. For a complete discussion of these criteria, please refer to the "Standards for Location" Section of Chapter 4 of this manual.

TYPES OF SPACE REQUIRED

Having identified the types of services and/or activities associated with an individual facility in its Annual Facilities Statement, the Agency should determine the types of space needed to house these functions. In assessing its needs, the Agency should pay particular attention to the specific technological, programmatic, or other organizational changes planned for the facility which will dictate the types of space required. The types of space the Agency may require include staff areas; support areas, such as storage, copy, mail, shared workstations, computer and telephone rooms, meeting areas, and reception areas. For a complete discussion

of the types of space which may be required, please refer to the “Space Allocation Standards” section of Chapter 4 of this Manual.

SPECIFICATIONS FOR BUILDING CONDITIONS, TENANT IMPROVEMENTS, AND LANDLORD SERVICES

The Commonwealth maintains specific standards for building conditions, tenant improvements, and landlord services for use by the Agency in its planning for individual facilities. The standards for building conditions concern those physical qualities of a building that determine its suitability for the specific office needs of the Agency. The standards for tenant improvements are the specifications which the landlord substantially meet in completing the build-out of the space. Landlord services standards include all of the building management services the landlord must provide to the Agency. Many of these standards are defined in the form Request for Proposals as performance specifications where feasible. The Agency should review the standard specifications and identify the need for any additional specifications. A complete discussion of these standards is included in Chapter 4 of this Manual.

BUDGETING FOR THE TOTAL COST OF THE FACILITY

The Agency’s individual facility planning should include an analysis of the total cost of operating the facility. In addition to costs which may be directly associated with the occupancy of the space, such as rent, utilities and janitorial service (if not included in the rent), the Agency should plan for the other operational and administrative costs associated with the facility. These costs may include such items as wiring; telephone system; photocopier, fax, and computer equipment; state vehicles; offices supplies; and furnishings.

E. HOW TO PREPARE THE FACILITY PLAN

In the Facility Plan, the Agency develops a program for leased space which describes the characteristics of an efficient and appropriate work environment for Agency activities. These characteristics include: search area and acceptable location for the facility; specific building features necessary for Agency operations or equipment; the amount of space required to accommodate the staff and activities of the office; and tenant improvements to make the space functional for the intended purpose.

DCAM has developed a framework, through the use of forms and instructions, and standards for all leased facilities that should expedite preparation of the RFP and result in a work environment which more effectively supports the mission, functions, and activities of the Agency.

This Section describes in detail DCAM standards which have been developed to promote equity among agencies in the quality of their space and to ensure that the most space is used most cost-effectively. Planning guidance is also provided to help agencies identify any special planning issues which may require modifying DCAM standards to meet the specific needs of the Agency.

The following principles should be kept in mind when preparing the Facility Plan Form:

- **Use DCAM standards.** The DCAM standards described in this section have been created to standardize and facilitate the process of determining space needs and preparing RFPs. If the Agency believes any of these standards are inconsistent with its needs in specific cases, the problem should be discussed with DCAM before a Facility Plan is completed.
- **Identify special needs early.** Some offices may have special needs due to the nature of their business activity (e.g. transaction counters, special security systems, access to a loading dock, etc.) and which should be identified and described in the Facility Plan so that appropriate specifications may be included in the RFP. In this way, proposers will be aware of these additional needs and the landlord can be held responsible for meeting them.
- **Limit the use of full height partitions.** In general, large open areas, subdivided by low partitions or systems furniture, will provide greater flexibility, allow for ease of communication, enhance safety and security, and provide better lighting and ventilation. Although some construction is necessary in preparing space for Agency occupancy, in the long term, it is generally more cost effective for Agencies to invest in movable furniture and partition systems than to require the landlord to build partitions. This makes it easier to reconfigure the space if needs change during the lease period, and it enables Agencies to take their investment from site to site. The use of full height partitions should be restricted to cases where it is really necessary. If you are not familiar with modular office systems and other low partition office set-ups, please contact DCAM for site visits of offices using such systems.

The Facility Plan provides information to create an RFP when the Agency is seeking a new rental agreement, or to evaluate an Agency's plan to continue occupancy at the same location.